myIEEE 1.90 Integrate IEEE MemberNet

**Business Requirement/**

**Functional Specification Document**

**Project ID = PC3938**

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# Project Introduction

## Document Purpose

The Business Requirements Document (BRD)/Functional Specification focuses on describing the business problem, opportunity, and the system related requirements to help design a technical solution.

This document contains detailed business system requirements, in numeric format, to effectively communicate requested modifications to the Technical Team (Application Development and Infrastructure) who will then perform technical analysis and design prior to development.

The document will also be used by the Quality Assurance team to create a Test Plan and Test Cases that will trace back to each specific and detailed requirement. Testing and product certification will then begin.

The document will be used to create training materials or to provide training throughout the organization.

## Project Objective

The goal of this release is to enhance and integrate IEEE MemberNet with myIEEE to create a single web experience. MemberNet will still exist as a component within MyIEEE.

## Project Summary

All MemberNet capabilities will be incorporated into MyIEEE to streamline the user experience.

# Business/Systems Requirements Overview

## Business/Systems Process (Present State)

MyIEEE is a premier, one-stop, and personalized web space provided to all IEEE Members. MyIEEE requires an IEEE web account, and dynamically serves personalized content for each member, including membership grade, section affiliation, service recommendations, local affiliation, and subscriptions. Additionally, myIEEE provides direct links into commonly used online utilities for managing the Members’ account. MyIEEE will continuously evolve based on the user centric design philosophy as well as ongoing market demands.

The myIEEE Mission

myIEEE is the virtual manifestation of IEEE membership. IEEE membership offers the following components in its electronic benefit portfolio:

* KNOWLEDGE – news, research tools, digital libraries, subscriptions and video based benefits.
* PROFESSION – mentoring, jobs, consultants, awards, scholarships and various other career based benefits.
* COMMUNITY - Section updates, member profiles, member elevation info, worldwide activities, professional networking, and conference information.
* VOLUNTEERING – news, updates, resources, positions, and member database access.

### The myIEEE Challenge

Extend and enhance the myIEEE mission with additional personalized content, networking opportunities, and customization capabilities, with the intent to exploit any electronic engagement opportunity across the institute via myIEEE.

### The Requirements

An ongoing research and collaboration effort has been executed by MGA Product Management staff since Q4 of 2007 with the core mission of extending and enhancing myIEEE. To begin research, initial prototypes were created and high level requirements were defined by utilizing a combination of industry best practices, staff knowledge, and volunteer advisors. As of today, the myIEEE vision has been presented to over 85 IEEE members, Staff, and volunteers in groups no larger than five. The objective of continuing the research is to validate and refine the initial proposed changes for myIEEE with interested stakeholders by gathering feedback for additional requirements while keeping up with market demands and industry best practices in mind. myIEEE will continue delivering value and a virtual engagement platform for IEEE members by providing the following:

* One-stop resource for engaging member benefits
* 365,000 websites, unique to each Member
* Connects individual members to their Section
* Establishes a “virtual home” during the transition from student member to young professional
* Updated daily from IEEE’s core databases and content sources
* Provides volunteers with a communication channel for engaging members

## Business/Systems Solution (Future State)

The major goal of this project is to improve membership retention by providing members with a platform where the content/benefits important to them can be easily found.. This change has been designed to improve retention rates which in turn translate to increased dues revenues as well as indirectly impact other revenue streams associated with growing membership. The main focus of this release is to enhance and integrate IEEE MemberNet with myIEEE to create a single web experience.

## Alternatives

Outsource all capabilities to an external professional networking platform. This approach was validated but it was deemed cost prohibitive when evaluating many of the solutions that could fill this gap.

## Assumptions

* Dependences on BMS will not deter project schedule
* BMS integration is assumed.

## Contingencies/Dependencies

* myIEEE is currently delivered through Vignette/CMS Gauss. IEEE is moving to a new CMS, Oracle’s UCM. This project is dependent on continuing with Vignette/Gauss as the portal solution for myIEEE.
* This project is tightly integrated with BMS. IEEE is moving to a replacement for BMS. This project assumes that BMS will still be in place when it is developed.

# Detailed Business Requirements

## Primary Business Requirements

|  |  |  |  |
| --- | --- | --- | --- |
| Req. ID | Primary Business Requirements | Priority  1/2/3 | Application  Dependency |
| BR01 | Community Desktop Enhancements | 1 |  |
| BR02 | Section Gadget on the Community Desktop | 1 |  |
| BR03 | Membership Gadget on the Community Desktop | 1 |  |
| BR04 | IEEE MemberNet/Who’s New Gadget | 1 |  |
| BR05 | IEEE MemberNet myProfile | 1 |  |
| BR06 | IEEE MemberNet Member Profiles | 1 |  |
| BR07 | Misc Global myIEEE Changes | 1 |  |
| BR08 | Volunteer Desktop enhancement (Member Version) | 1 |  |
| BR09 | Volunteer Desktop enhancement (Volunteer Version) | 1 |  |
| BR10 | Contextual Help Changes | 1 |  |

# Detailed Business Specifications

## Web Page/GUI Screen, Search Engine & Browser - Functional Specifications

|  |  |  |  |
| --- | --- | --- | --- |
| Req. ID | Detailed Business System Specifications | Priority  1/2/3 | Application  Dependency |
| *4.1-FS01-01* | The myIEEE Community Desktop The Community Desktop gadgets will be enhanced to display the following view for IEEE members. As in memberNet today, a banner ad will be displayed. The size of this banner ad will be adjusted to the new 720 by 90 standard. (Leaderboard). This banner will be located at the base of the page just above the footer.  Gadgets found on this page:   * myNetworks(Navigational Gadget) – FS01-02 * Expand myNetworks – FS01-03 * IEEE Worldwide (Previously Worldwide Activities) – FS01-04 * Upcoming Conferences – FS01-05 * Section Gadget – FS02-01 – FS02-05 * Membership Gadget – FS03-01 through FS03-06 * IEEE Section Activities(Vtools) – FS01-06 * IEEE memberNet Spotlight – FS01-06 * IEEE memberNet \ Who’s New – FS04-01 * IEEE.tv Conference Highlights – FS01-06 * IEEE Grade Elevations – FS01-06   *Please Note: as myIEEE does today, the application will adjust the search dropdown area default to execute a search via MemberNet when users arrive on the Community desktop.* | 1 |  |
| *4.1-FS01-02* | myNetworks Navigation The “myNetworks” navigational gadget will match the functionality found in the myNetworks area currently available via IEEE memberNet with the exception of the list order. Furthermore, it will serve as the persistent sub navigation for the Community Desktop in myIEEE.  **New Requrement** – A new personlized “Geography” area will be provided via the myNetworks navigation. Items found here will be generated based on the users primary address in the system. Upon click, the canned search results will be provided based on the applicable region, country, state and city. The results provided via the new geographic based networks will be subject to the same opt-in restrictions as other networks listed here. Furthermore, the geographic list order should be: region, country, state/provence, then city. Search results provided once an item is clicked will filter search results based on the geographic hierarchy. IE. A city provided here will be a subset of the state/providence, which is a subset of Country. Region maybe a subset of Country or Country maybe a subset of region depending upon the location.  When an item is selected from the myNetworks navigation, the user will be presented with the memberNet search results screen containing a list of the members from a given network. If a user does not have a network for a given section of the sub-navigation the current messages coded in memberNet should be enhanced as follows. Memberships: “None found, join via [myAccount](http://sbwsweb.ieee.org/ecustomercme_enu/start.swe?SWECmd=GotoView&SWEView=Catalog+View+(eSales)_Membership_IEEE&src=0&mem_type=Customer).” Employer, TIP, Education, Geography: “None found, update via [myAccount](http://sbwsweb.ieee.org/ecustomercme_enu/start.swe?SWECmd=GotoView&SWEView=Catalog+View+(eSales)_Membership_IEEE&src=0&mem_type=Customer).”  Search results provided here will be returned by leveraging the same logic the memberNet search results use today, based upon each members opt-in preferences. The key difference is the user interface as 20 search results will now be displayed vs 10 previously. As in memberNet today, a banner ad will be displayed. However, the size of this banner ad will be adjusted to the new 720 by 90 standard. (dart scripts to be provided). This banner will be located at the base of the page just above the footer.  *Additional Note: In today’s environment, results may not return certain members who match a given search criteria. To honor member privacy, an individual member listing in search results can be permission-based depending upon the search criteria. MemberNet permissions are managed via each member’s “MemberNet Opt-In Preferences'. Additionally, the contextual help on the search results page should remain the same as other areas of the community desktop.* | 1 |  |
| *4.1-FS01-03* | Expand myNetworks Gadget The “Expand myNetworks” gadget will provide the same feature found in memberNet called “Expand myNetworks”. It contains three randomly generated networks based on a list of the networks that are not found in a user’s profile with an icon. If a user is already a member of a society or other affinity the network will not show in this list. If more than three networks are associated with the list of networks not found in a users profile the more link will appear.    The more link will provide users with an inline view of all the networks not found in a given user profile. If an item in the full list is clicked on, the inline popup will transition from the “full list” to display the OU specific information. This feature is currently available via the service advisor module. The expand myNetworks gadget will remain persistent on the left side of the interface as shown in req FS-01-01. | 1 |  |
| *4.1-FS01-04* | IEEE Worldwide Gadget This gadget was formerly named IEEE worldwide activities in myIEEE. Gadget interactivity and functionality should not be changed from what is found in today’s version of myIEEE. However, the gadget will be resized to match the reduced column width. Introductory text will be changed to “Find sections, section officers, and conferences. As in today’s environment, the links will bring the users to an inline search utility that will provide the ability to search based on geographic area (region and country). This gadget will remain persistent on the left side of the community desktop as shown in requirement FS-01-01.    One other minor change that will be made to this area of myIEEE. That is, the city will be moved beneath the date in the upcoming conferences inline display. This will normalize the conference viewing experience as it relates to requirement FS01-05. |  |  |
| *4.1-FS01-05* | Upcoming Conferences Gadget The upcoming conferences gadget interactivity and functionality should not be changed from what is found in today’s version of myIEEE. However, it will be resized to match the reduced column width and the number of conferences shown will be reduced to two. Notice the descriptive area has changed to “Members receive price discounts when attending IEEE conferences.” The format of the gadget will be changed to show a linked conference name first then date and location. The “More” link will bring users to the conference search website as it does in today’s environment. This gadget will remain persistent on the left side of the community desktop as shown in requirement FS-01-01. |  |  |
| *4.1-FS01-06* | IEEE.tv Conference Highlights The IEEE.tv conference highlights gadget should be altered to interface with the IEEE.tv API. As per the API specifications(to be provided), a parameter can be passed specifying a given series and the resulting XML will be provided containing all of the videos and associated meta information associated with the conference highlights series. The small image and program title should be displayed in the same fashion as it is in today’s myIEEE environment. Three programs should be shown at random with the associated thumbnail image. |  |  |
| *4.1-FS01-07* | Global Section Activities(Formerly Section Activites) This gadget should be altered to retrieve data from the associated global Vtools meetings XML feed. The url for this information is: <http://meetings.vtools.ieee.org/meetings/xml>. The XML should be parsed and the associated inline popup should be rendered in myIEEE for users the same way an announcement added via content management is rendered. The announcements form should remain integrated with this gadget as well as it is in today environment. Please note, in today’s environment, this feature launches the Vtools webpage in a standard JS popup.    If the more link is clicked a list should be provided of all the events and for events that have a date associated, a graphic should be associated to illustrate the date of the event. Upon click, the appropriate meeting should be launched inline as shown. On the event view, a back button should be provided to bring users back to the full list. In addition to the back button, a close button should be provided to bring users back to myIEEE. |  |  |
| *4.1-FS01-08* | Exsisting Gadgets on the Community Desktop The following gadgets will remain on the community desktop with no changes other than positioning as shown in FS-01-01.  Gadget Titles:   * IEEE memberNet Spotlight * IEEE Grade Elevations |  |  |
| *4.1-FS01-09* | Section and Membership Gadgets Gadgets on the community desktop will be presented based on each membership and section network found via each member’s profile. Variants of the gadgets will be presented for each of the two network types listed in the myNetworks Navigation area, “Section” and “Membership”. The illustration shows the two different scenarios.  **Section Gadget** – Will contain four tabs: mySection, Meetings, Who’s New and Elevations. For more on this gadget see requirements FS02-01 through FS02-05.  **Membership Gadget** – will contain five tabs; Conferences, Who’s New and Elevations. For more on this gadget see requirement requirements FS03-01 through FS03-05. | 1 |  |
| *4.1-FS02-01* | Section Gadget The section gadget will be generated based on the network or networks found in the “Section” area of the myNetworks navigation as described in requirement FS01-02. This gadget will contain four tabs:   * MySection - defined in requirement FS02-02 * Meetings - defined in requirement FS02-03 * Who’s New? - defined in requirement FS02-04 * Elevations- defined in requirement FS02-05   In addition to four tabs, this gadget will contain an officer’s icon that brings users to an inline popup containing all of the executive officers as described in requirement FS07-02. All section gadgets should be tied to the same help content. | 1 |  |
| *4.1-FS02-02* | Section Gadget – mySection Tab The “mySection” tab will display four links based on what section the user is a member of. The links will bring the user to the following areas: Section web site (New Window), Section Officers (Inline Popup), Technical Chapters (Inline Popup) and Affinity Groups (Inline Popup). This tab is very similar to the existing gadget in myIEEE called “mySection”. Links provided here will launch a display of either the Technical chapters of the section or the Affinity Groups of that section.  Link Descriptions:   1. Section Website will bring the user to the associated section website URL in a new window. The URL will be retrieved from the IEEE data store. 2. The section executive officer’s link will provide users with an inline popup containing the executive officers for a given section. This area contains section name, position, email, and name (linked to memberNet). If a user clicks on a name via this inline popup, the memberNet quick view interface should be provided as described in requirement FS06-02. 3. The technical chapter’s link will bring the users to an inline popup viewing all of the technical chapters associated with a section with links to the executive officers for each. The executive officer’s icon interaction is described further in requirement FS07-02. 4. Affinity groups will bring the user to an inline popup view providing names and executive officer links for each affinity unit. The executive officer’s icon interaction is described further in requirement FS07-02.   Note: All inline views should contain a close button on the interface. |  |  |
| *4.1-FS02-03* | Section Gadget – Meetings Tab The “Meetings” tab will display associated XML feed from Vtools for the given section. This gadget will priovide hyperlinks to all of the vtools meetings or upcoming events that volunteers have added. The interaction is the same as the section activities module in myIEEE today (below). If no meetings are found in an associated XML feed, the tab should be shown and a default message should be shown to users via the tab gadget. IE- MyIEEE has not found any entries associated with your section via the Vtools meeting management system.  The URLs for the XML feeds on the vtools system are generated based on the OU geocode. These urls would need to be generated dynamically via myIEEE. An example of a geocode based section XML feed link is:  <http://meetings.vtools.ieee.org/meetings/xml/R80041>  All sections have feeds created in XML, and the urls are generated using the same automated logic that is used for geo codes. The XML should be parsed and the associated inline popup should be rendered for myIEEE users showing the meeting information. Please note, in today’s myIEEE environment, this feature launches the Vtools webpage in a popup. The more link provided here should generate a list the same way the global section activities gadget does in requirement FS01-07. | 1 |  |
| *4.1-FS02-04* | Section Gadget – Who’s new tab The “Who New?” tab will display the members from a section who have recently joined the IEEE. Individuals who have recently joined the IEEE will remain in the who’s new area for 90 days. (same configurable parameter as defined in req 04-01) The information displayed here will include: Photo(if feasible) grade icon, last name, first name, and grade. If a user clicks the name link via the gadget the full member profile (see requirement FS06-01) of the given user will be displayed. If there are more than four new users, a “more” link will be provided on the bottom of the gadget. The more link will bring users to an inline popup, listing all new users that meet the who’s new criteria described above, including the four listed in the gadget. If a user clicks on a member name via the inline popup, the profile quick view interface will be provided inline. | 1 |  |
| *4.1-FS02-05* | Section Gadget – Elevations Tab The “elevations” tab will display the members who were elevated in the current year. If a user selects this tab myIEEE will present the listing of members. The information displayed here will include: grade icon, lastname, firstname, and grade. If a user clicks the name link via the gadget the full member profile (see requirement FS06-02) of the given user will be displayed.  If there are more than four new users, a “more” link will be provided on the bottom of the gadget. The more link will bring users to an inline popup, listing all new users that meet the elevations criteria described above. If a user clicks on a member name via the inline popup, the profile quick view interface will be provided inline. More information on the quick view user interaction can be found in requirement FS06-02. | 1 |  |
| *4.1-FS03-01* | Membership Gadget The membership gadget will be generated based on the network or networks found in the “Membership” area of the myNetworks navigation as described in requirement FS01-02. This gadget will contain five tabs:   * Conferences - defined in requirement FS03-02 * IEEE Xplore - defined in requirement FS03-03 * Who’s New? - defined in requirement FS03-04 * Elevations - defined in requirement FS03-05 * myMembership – defined in requirement FS03-06 * Edit gadget – defined in requirement FS03-07   In addition to five tabs, this gadget will contain an officer’s icon for each membership that brings users to an inline popup containing all of the executive officers as described in requirement FS07-02 and a link to the membership OU website. The ou title will be linked to the respective membership website url, retrieved from the IEEE data store as it is in today’s myIEEE environment.  In today’s myIEEE environment, the gadget provides a “Show All” feature when it detects more than three memberships. This logic should be changed to show the show all feature for scenarios where there are more than two memberships. The label on this should be changed from Show All to “Show all Memberships” and Hide to “Hide Memberships”. The show all feature will provide a toggle for users to display or hide memberships in scenarios where there are more than two. | 1 |  |
| *4.1-FS03-02* | Membership Gadget – Conferences The “Conferences” tab of the Membership gadget will display the conferences related to a given membership. The gadget behaves in the same functionality as the “my Memberships” gadget on myDesktop.  If no conferences are found in an associated feed, the tab should be shown and a default message should be shown to users via the tab gadget. IE- MyIEEE has not found any entries associated with this membership via the IEEE Conference management system.  If a user clicks a conference link myIEEE will priovide the conference details in an inline popup. If the user clicks on the more conferences link, a list of all conferences will be provided. Upon click, the user will be provided with the appropriate conference details. | 1 |  |
| *4.1-FS03-03* | Membership Gadget – IEEE Xplore The “IEEE Xplore” tab of the Membership gadget will display xplore publications related to a given membership called via the Xplore XML gateway(API document provided). If a user clicks on a link here a new window will provide the publication abstract page on the xplore platform. If the user clicks the more link(Titled: More related articles on IEEE Xplore) here, they will be taken to the related search results page on the xplore platform. An example of a search link related to the computer society on the xplore platform is: http://ieeexplore.ieee.org/search/freesearchresult.jsp?newsearch=true&queryText=Computer+Society&x=0&y=0 |  |  |
| *4.1-FS03-04* | Membership Gadget – Who’s New The “Who New?” tab will display the members from a membership who have recently joined the IEEE. Individuals who have recently joined the IEEE remain in the who’s new area for 90 days(same configurable parameter as defined in req 04-01). The information displayed here will include: grade icon, last name, first name, and grade. If a user clicks the name link via the gadget the full member profile (see requirement FS06-01) of the given user will be displayed. If there are more than four new users, a “more” link will be provided on the bottom of the gadget. The more link will bring users to an inline popup, listing all new users that meet the who’s new criteria described in requirement FS04-01. If a user clicks on a member name via the inline popup, the profile quick view interface will be provided inline. | 1 |  |
| *4.1-FS03-05* | Membership Gadget – Elevations The “elevations” tab will display the members who have been elevated in the current year. If a user selects this tab myIEEE will present a listing of applicable members. The information displayed here will include: grade icon, last name, first name, and grade. If a user clicks the name link via the gadget the full member profile (see requirement FS06-01) of the given user will be displayed. If there are more than four new users, a “more” link will be provided on the bottom of the gadget. The more link will bring users to an inline popup, listing all new users that meet the elevations criteria described in requirement FS02-05. If a user clicks on a member name via the inline popup, the profile quick view interface will be provided inline. | 1 |  |
| *4.1-FS03-06* | Membership Gadget - myMemberships The myMembership area of this gadget will provide three components.   1. Link to the official website - The membership website url will be retrieved from the IEEE data store as it does in today’s environment via the myMemberships Gadget. 2. Executive officers - this gadget will contain an officer’s icon that brings users to an inline popup containing all of the executive officers as described in requirement FS07-02 and a link to the membership OU website. 3. Related Subscriptions – The related subscriptions associated with a membership will also be listed in this gadget. The same logic is available via myIEEE today on the knowledge desktop in the module entitled mySubscriptions. | 1 |  |
| *4.1-FS03-07* | Membership Gadget – Edit Features For the myMemberships gadget a new gear icon will be provided to users. If the gear icon is clicked, a window shade effect will transition to show a list of all the IEEE memberships associated with the user profile. Each membership listed will have an associated check box and users can select or deselect items via the edit area. Upon save, all items selected in the gadget edit area will render an equivalent presence within the gadget as outlined in requirements FS03-01-FS03-06. By default all items in the edit area will be in a selected state. Furthermore a validation rule should be added to this web form that forces the user to select at least one membership. Upon save if no memberships are selected the following alert should be provided “Please select at least one membership”. If a member has no memberships the gadget should present an updated message as shown. In addition to the updated message, the gear icon at the top of the gadget used for editing will be removed. |  |  |
| *4.1-FS04-01* | IEEE MemberNet/Who’s new Gadget The IEEE memberNet gadget will provide a short description and links to the Opt-In Preferences area (Req. FS05-02) and the advanced search facility that will provide users with the existing memberNet query tool. See requirement FS 04-02 for more on the advanced search feature.  The underlying logic generating the “Who’s new” area on this gadget will retrieve individuals who have recently joined the IEEE. The length of time the myIEEE who’s new area should go into the past should match the current who’s new capability (90 days). This 90 day variable should be a configurable value editable via a help desk ticket. Currently, this feature retrieves members who joined recently, and in most cases the profile information is empty.  A new more link will be provided that will bring users to a paginated inline view of all the members who match the “who’s new” criteria as described above. | 1 |  |
| *4.1-FS04-02* | MemberNet Advanced Search This area can be accessed via the memberNet gadget as shown in requirement FS 04-01. It will provide an advanced search feature for users similar to what is provided in IEEE memberNet today with one caveat. The country area found in the search area should be changed to “Region / Country” and the IEEE regions should be added to the list in alphabetical order as shown.  The advanced search query building tool can be used to define an advanced search query. Search results will be displayed as described in requirement FS04-03.    Please note: As memberNet does today, a banner ad is displayed. The size of this banner ad will be adjusted to the new 720 by 90 standard.(Leaderboard Banner) This banner will be located at the base of the page just above the footer. | 1 |  |
| *4.1-FS04-03* | MemberNet Search Results When a user runs a search via the myNetworks navigation area or the advanced search area a paginated list of users should be provided to users. The list provided will contain the same data set as memberNet returns today. Also, in todays world, the IEEE memberNet search supports parameter based searches. This feature should be preserved and ported over as per this requirment accordingly.  The key differences are, more results will be provided on the inteface for the user (20). The sort features at the top of the grid on the interface(Next to Name and grade), and the links and information found at the base of the search results below the pagination should be preserved and priovided via the new myIEEE implimentation. |  |  |
| *4.1-FS05-01* | myProfile The myProfile link will bring users to a version of their own profile for reviewing. By selecting the link in the header titled “myProfile”, the content area of myIEEE will change to display the users profile information as shown. In addition to the users profile, the Service Advisor gadget will be positioned on the right of the personal profile information when users are viewing their own profiles.  The service advisor gadget should be changed to remove the technical interests from the interface. The links provided in the recommended publication products should be clickable. This can be achieved by 1) Generating the add to cart button logic to add this pub to the cart via myIEEE. OR 2) If the add to cart button is not feasible, the IEEE Xplore XML gateway could be used to generate the recommended publication products list. All items found in this list will be linked to the appropriate location in IEEE Xplore. URLS and titles can be retrieved from the IEEE Xplore XML gateway. (API spec provided) If this approach is chosen, Tip codes will be used in conjunction with the Xplore XML gateway to provide a list of recommended publications.  **New profile requirement** – Currently memberNet offers an area in the profile to show each members location information. This area will be enhanced to include, City, State or Providence and Country as shown. If the respective opt-in checkbox area has been selected as per requirement FS05-02, the location in the profile will now show city, state/ providence, country and section.  If a user is viewing their profile, and the messaging feature has been activated, the button will show “Messaging Active”. If messaging has been activated, the button provided will not be linkable. Furthermore, a 720 by 90 Leaderboard Banner will be placed at the base of the page just above the footer to preserve the sponsor presence. | 1 |  |
| *4.1-FS05-02* | Edit My Opt-in Preferences When the “Edit My Opt-In Preferences” button is selected via a users profile, the user will be presented with the edit opt in preferences screen that provides the interface to opt-in the individual components of a member profile.(Matching existing functionality).  **New opt-in requirement** – Currently memberNet offers an area for members to opt in location information. This area will be enhanced to include, City, State or Providence and Country as shown. If the respective opt-in checkbox area has been selected, the location in the profiles as per requirement FS05-01 will now show city, state/providence, country and section.    The default search selected in the dropdown box found in the header will be changed to search IEEE memberNet. The “Service Advisor” gadget will remain on the right side of the personal profile. Furthermore, a 720 by 90 Leaderboard Banner will be placed at the base of the page just above the footer. (JS code will be provided) | 1 |  |
| *4.1-FS06-01* | Member Profiles If the member name is provided from any gadget embedded on a desktop in myIEEE, it should bring the user to the associated member’s profile on the community desktop. This includes, IEEE memberNet, Search Results, Member spotlight, Who’s New, and Elevations.  **New opt-in requirement** – Currently memberNet offers an area for members to opt in location information. This area will be enhanced to include, City, State or Providence and Country as shown in FS05-02. If the respective opt-in checkbox area has been selected, the location in the profiles as per requirement FS05-01 will now show city, state/providence, country and section.    If a user is viewing a member list in myIEEE via any other area from within an inline pop-up, the transition will be made to the associated profile quick view inline area will be launched as described in requirement FS06-02. A 720 by 90 Leaderboard Banner will be placed at the base of the page just above the footer. | 1 |  |
| *4.1-FS06-02* | Profile Quick Views The application will provide “Profile Quick Views” for use when a user is clicking on a member name from within an inline popup. Upon click, the member profile is transitioned from the active inline view to the profile quick view interface inline. Examples of where this feature would be used are: Who’s Online, Executive officers, IEEE Grade Elevations, more via member elevations(section and membership gadgets) or any other gadget that includes a “more” link to an inline list of members. If the user is viewing a member list in myIEEE via any other area aside from an inline pop-up, the member profile page will be launched via the community desktop as described in requirement FS06-01. The back button provided here will not close the inline view; instead it will bring the user back to the list from which they selected the members profile from as shown. During the time the inline popup is being populated with content, the user should be shown a loading animation.  **New opt-in requirement** – Currently memberNet offers an area for members to opt in location information. This area will be enhanced to include, City, State or Providence and Country as shown in FS05-02. If the respective opt-in checkbox area has been selected, the location in the profiles as per requirement FS05-01 will now show city, state/providence, country and section.  Additionally, the application will support the capability to have a 720/90 leader board banner ad at the bottom of the member profile quick view inline JS window. | 1 |  |
| *4.1- FS07-01* | myIEEE Alerts – Release Message The first time users log in to myIEEE after the 1.9 release they will be presented with a new alert via the myIEEE Account Alerts area(being developed in myIEEE rev 1.85). This link will bring the user to an inline dialog box advising each user that the community desktop has been re-vamped. This box will contain text explaining the contents of this release.  Sample: | 1 |  |
| *4.1-FS07-02* | Executive Officers In various places across myIEEE today the rolodex icon () is provided to users. This capability provides users with a link to an inline popup window that contains the executive officers from a given organizational unit. The member name provided here is hyperlink to the associated quick view profile. For more on the quick view functionality see requirment FS06-02. Please Note, this feature functionality is available in the current version of myIEEE. | 1 |  |
| *4.1-FS07-03* | Who’s Online Filter The Who’s online interaction should remain consistent with today’s myIEEE environment. The link is available via the header and when clicked, the Who’s online area opens inline. That said, a new feature will be added to the window to provide users with the ability to filter the results provided. As shown, a button will be added to the interface entitled “Filter Who’s Online”. When selected a new display will be presented showing a real time filtering capability.  The filtering capability will be based on name and grade and the list provided below the search will be filtered in real time as the user is typing in the name field or if a user selects a member grade from the dropdown.  Key points associated with this feature:  1) Names are searched in real time as the user is typing. In other words, if a user beings typing Baker, the results will be shown as the user is typing.  2) The logic utilized for showing in search results is done with the same set of criteria as the IEEE MemberNet Search feature. Specifically, members can only be found by the criteria that they have opt-ed in. Additionally, if a user has toggled themselves offline via myIEEE, the display should not show the user within the results.  3) The total number of users online will be shown on the top right of the popup.   1. When a user clicks on the turn filter off, the filter will be cleared, interface “window shade” will close and all who’s online results will be shown. | *1* |  |
| *4.1-FS07-04* | Add to library for Customize Tool **Customize tool changes via MyDesktop** - The following gadgets will be added to the customize tool in the community area:   * Section Gadget * Membership Gadget * Expand myNetworks   The “mySection” gadget should be removed from the community area in the customize tool.  **Customize tool changes via Volunteer Desktop** - The following gadget will be added to the customize tool in the volunteer version of the volunteer desktop:   * Prospective Volunteers * IEEE.tv Videos on Volunteering |  |  |
| *4.1-FS07-05* | Calling a memberNet profile using an encrypted member number In today’s environment IEEE memberNet profiles can be called from any external system by using an encrypted IEEE member number. This feature should be preserved, however instead of calling the member profile in a small popup, the system should call the full member profile as described in requirement FS06-01. |  |  |
| *4.1-FS07-06* | Global Inline Pop up Adjustments In myIEEE if a user clicks on certain content types an inline popup is provided and the content is rendered in myIEEE. The following adjustments should be made to all of the inline popups found in myIEEE with the intent to improve popup usability.   1. The popup itself should contain rounded corners vs square corners as in today’s env. 2. The fade effect that darkens the backdrop when an inline popup is shown should be adjusted to 50% occupancy. 3. The close link found in the lower portion of the page should be changed to display a button. 4. The popup size should be generated based on the screen resolution and should not be fixed in size. The popup size should provide a top and bottom padding of 40 px and the total height of the popup should not be allowed to go smaller than 300px tall. The total width of the popup should not go smaller than 850px wide and in situations where the screen resolution permits, it should be dynamically re-sized to have a 160px pad on the right and left. |  |  |
| *4.1-FS07-07* | Default memberNet opt-in preferences By default and in addition to name and grade, all IEEE members will have Location, Memberships, and Technical Interests should be opted in to the system. The functionality to opt out will remain in the system, however the default state will be changed to opt-ed in for all IEEE members for these fields. |  |  |
| *4.1-FS08-01* | Volunteer Desktop for Non-Volunteers The new version of the volunteer desktop will be provided to members who are not designated as a Volunteer in the IEEE data store. The main goal of this new version is to provide interested members with the ability to express their interest in volunteering. This new volunteer recruitment tool will be leveraged on the volunteer side of myIEEE to provide officers with a list of members who are interested in volunteering. This new tab will be located on the far right side of the myIEEE navigation for members. Please note this tab location is specific to members. The volunteer tab developed for volunteers should not be impacted.    The gadgets of the Volunteer desktop for a non-volunteer are:   * Volunteering Networks * Voluteer Recruitment * Member Spoltlight – volunteer * Volunteer resources * IEEE.tv Videos on Volunteering | 1 |  |
| *4.1-FS08-02* | Volunteering Networks Gadget The volunteering Networks Gadget will show users a list of the networks that they currently belong to in the Section and Memberships area of the community desktop. Sections and societies listed in the “Volunteering Networks” area should e listed based on the user profile in the same approach as the community desktop. However the categories are not visible and the links should bring the user to the associated society or section website. Society and section websites should be retrieved from the IEEE data store in the same fashion as mySection and myMemberships. |  | 1 |
| *4.1-FS08-03* | Volunteer Resources The volunteer resources gadget is a list of static hyperlinks to the following resources:  Link Title: Author Tools/Submission Guide  Link URL: http://www.ieee.org/publications\_standards /publications/authors/index.html  Link Title: Conference Organizers  Link URL: http://www.ieee.org/conferences\_events/ conferences/organizers/index.html  Link Title: Conference Publication Organizers  Link URL: http://www.ieee.org/conferences\_events/conferences/publishing/index.html  Link Title: IEEE Board of Directors Resources  Link URL: http://www.ieee.org/board  Link Title: IEEE-USA Volunteer Central  Link URL: http://www.ieeeusa.org/volunteers/default.asp  Link Title: Membership Development  Link URL: http://www.ieee.org/about/volunteers/membership\_development/md\_reports.html  Link Title: Section Chapter Support  Link URL: http://www.ieee.org/societies\_communities/geo\_activities/units/index.html  Link Title: Standards Development  Link URL: http://standards.ieee.org/stdsdev/index.html  Link Title: Strategic Research & Planning  Link URL: http://www.ieee.org/research  Link Title: Student Concourse  Link URL: http://www.ieee.org/students  Link Title: Transnational Resources  Link URL: http://www.ieee.org/web/volunteers/transnational/home/index.html  Link Title: Volunteer Resources (general)  Link URL: http://www.ieee.org/about/volunteers/index.html | 1 |  |
| *4.1-FS08-04* | Member Spotlight – Volunteer The memberNet spotlight provided on the new volunteer desktop for non-volunteers will repurpose the same gadget that is provided in today’s environment on the volunteer version of the volunteer desktop. This gadget spotlights only active volunteers. | 1 |  |
| *4.1-FS08-05* | IEEE.tv Videos on Volunteering Gadget A new IEEE.tv gadget will be created that provides users with videos that return when a search query is ran on IEEE.tv for volunteering. A rest API will be provided for use with this gadget from IEEE.tv and it will return XML based on search parameters. API documentation is available. This gadget will show title, short description, thumbnail and link. When a user clicks on a video thumbnail or title the IEEE.tv viewer will be launched playing the video in question. The result set will randomize three programs on the gadget. |  |  |
| *4.1-FS08-06* | Volunteer Recrutiment Gadget The volunteer recrutiment tool will allow the end-user to submit a form inicating they are interested in volunteering. The items found in this form are: Section/OU(Volunteering Network), Orgainzation Management Skills, and Comments/Special Volunteering Skills. Both the Organizational Management Skills and the Comments/Special Volunteering Skills should be a text area limited at 2000 characters. Both form areas provided will contain a character count to illustrate the number of characters remaining in the bottom right corner. The items listed in the Section/OU dropdown area will be the same items found in the volunteering networks gadget defined in FS08-02 Once submitted, the user will be provided with a confirmation message and the information provided is passed into the prospective volunteers gadget as defined in requirment FS09-01.  The volunteer recruitment tool will only allow users to submit themselves to a volunteering network one time per membership term.(March 1 –Feb 28) Once a user has submitted themselves for a position, the network should remain in the dropdown but if a user has already submitted him/herself via this tool in a given membership year the thank you message will show as shown above. | 1 |  |
| *4.1-FS09-01* | Prospective Volunteers Gadget If a member who is not a volunteer has provided information via the Volunteer Recruitment Gadget(Defined in Requirement 08-06) the submission will be shown to the appropriate volunteering network in the “volunteer” version of the volunteer desktop. For an applicable network, the prospective volunteers gadget will be added to the volunteer desktop in the center position at the bottom of the interface. The gadget will only show users who have submitted themselves for a volunteering network for a full membership year.(March 1 –Feb 28) The gadget will provide the volunteer officers with a photo, first/last name, email address and a link to view more info from Prospect. This gadget will behave as per the customize privladges on the page. In other words, if a user has customize privladges they can remove the gadget or remove individuals from the gadget. If they are not labled as a customize user, the customize and remove individuals features will be disabled on the gadget. If no members have provided information or the volunteers have removed all volunteers listed in the gadget a default message should be displayed in the gadget as shown and the short description area should be removed from the gadget.  **Gadget Definition(Required for a Volunteer Desktop Gadget)**  Gadget Title: “Prospective Volunteers – <Name of OU>”  Gadget Type: Dynamic  Gadget C-Level: Global  **(refer to appendix C for more information on Gadget type and C-level as they relate to the volunteer desktop)**  **Security Model:**  View: All Volunteers  Customize: Admin, Designated Volunteers, Designated Staff  **The gadget is included in the following page types:**   1. GEO Unit “Officer” subpage 2. Society “Officer” subpage   In result, the dynamic gadget libraries will only include this gadget for these two page types.  The view more info link will provide the volunteer officers with an inline popup Titled Prospective Volunteer – More Information. The following links and inofrmation will be available via the inline view.   * Users photo * First and Last Name * Email Address * Link to profile on membernet * Organizational Management Skills * Comments/Special Volunteering skills * Leaderboard Ad(Same ad spot as memberNet)     If a user clicks the back or close buttons the inline view will be closed. If a user clicks on the “View on MemberNet” link the users memberNet profile will be shown via the quick view interface as defined in Requirement FS06-02. If a user selects the remove from prospects button or the remove icon on the gadget, the assocated prospect will be removed from the list provided in the gadget. The send message button provided here will open the memberNet send a message inteface inline. |  |  |
| 4.1-FS10-01 | Volunteer Desktop and Community Desktop contextual Help Help will be provided on the volunteer desktop via the help icon in the myIEEE header as it is today. When users click, an inline popup will be shown that contains a navaigatable interface. Each module on the page contains a link and associated help text. Module help content will be provided via the CMS during the development phase of this project.   1. The existing version of the volunteer desktop help area should contain a new nav item for the new gadget.        1. The Community desktop help interface should contain new nav items for all of the new gadgets. All current help content for modules should be preserved. 2. The new version of the Volunteer desktop that is shown to non-volunteers or members will contain the following help interface. |  |  |

## Reporting & Analytics - Functional Specifications

|  |  |  |  |
| --- | --- | --- | --- |
| Req. ID | Detailed Business System Specifications | Priority  1/2/3 | Application  Dependency |
| 4.2- ALL-  01 | Existing web trends reports should be ported from IEEE memberNet to myIEEE.  All App-worx reporting should be preserved and sent on a weekly basis as they are today. |  |  |

## System Performance (SLA) - Functional Specifications

|  |  |  |  |
| --- | --- | --- | --- |
| Req. ID | Detailed Business System Specifications | Priority  1/2/3 | Application  Dependency |
| 4.3- ALL-  01 | The application performance should be compared to the baseline SLAs of myIEEE2.0 performance, for response times and server usage.  Baseline results:  L:\QA\_Project\_Docs\Portal\PC3936\_myIEEE\_20\QA DOCS\myIEEE2.0 Perf Results.docx |  |  |
| 4.3-ALL-02 | Performance should be analyzed under baseline, and 130% of expected production load / transaction volume.(For myIEEE2.0 expected production load was 1400 hits/day and tested with 2500 hits/day)  Baseline User flows and Load metrics:  L:\QA\_Project\_Docs\Portal\PC3936\_myIEEE\_20\QA DOCS\Perofrmance\_Business Processes.docx |  |  |

## 4.4 Hardware - Functional Specifications

|  |  |  |  |
| --- | --- | --- | --- |
| Req. ID | Detailed Business System Specifications | Priority  1/2/3 | Application  Dependency |
| NA | Existing hardware is sufficient to meet the requirements of this change |  |  |

## 4.5 Software - Functional Specifications

|  |  |  |  |
| --- | --- | --- | --- |
| Req. ID | Detailed Business System Specifications | Priority  1/2/3 | Application  Dependency |
| NA | No additional software purchases are required for this change |  |  |

## 4.6 Data Conversion - Functional Specifications

|  |  |  |  |
| --- | --- | --- | --- |
| Req. ID | Detailed Business System Specifications | Priority  1/2/3 | Application  Dependency |
| NA | No data conversion requirements exist for this change |  |  |

## 4.7 System Security - Functional Specifications

|  |  |  |  |
| --- | --- | --- | --- |
| Req. ID | Detailed Business System Specifications | Priority  1/2/3 | Application  Dependency |
| NA | Existing security is sufficient for this change |  |  |

## 4.8 Documentation - Functional Specifications

|  |  |  |  |
| --- | --- | --- | --- |
| Req. ID | Detailed Business System Specifications | Priority  1/2/3 | Application  Dependency |
| NA |  |  |  |

## 4.9 Business User Training - Functional Specifications

|  |  |  |  |
| --- | --- | --- | --- |
| Req. ID | Detailed Business System Specifications | Priority  1/2/3 | Application  Dependency |
| 4.11-1 | Member Services and the IEEE Help desk will be offered training on this release. Training presentations will be provided by the product management team. |  |  |

## 4.12 Implementation & Support - Functional Specifications

|  |  |  |  |
| --- | --- | --- | --- |
| Req. ID | Detailed Business System Specifications | Priority  1/2/3 | Application  Dependency |
| NA |  |  |  |

## 4.13 Disaster Recovery & Business Continuity - Functional Specifications

|  |  |  |  |
| --- | --- | --- | --- |
| Req. ID | Detailed Business System Specifications | Priority  1/2/3 | Application  Dependency |
| NA | Existing DR & BCP processes are sufficient for this change |  |  |

## 4.14 System Monitoring - Functional Specifications

|  |  |  |  |
| --- | --- | --- | --- |
| Req. ID | Detailed Business System Specifications | Priority  1/2/3 | Application  Dependency |
| NA | New System Monitoring must be ported over to the appropriate locations within myIEEE from MemberNet. However, the existing MemberNet Scripts must be preserved as they will be re-used for the Fellows / MemberNet project at a later date. |  |  |

# Business and System Examples

*<This section should provide system graphical examples of system input/out.*

*This will allow the developers to visually see examples for their technical design and development. >*

## Report Sample(s)

*No reports.*

## Business Use Case (s)

<If relevant, describe business process examples using the new system solution.>

### Community Desktop gadgets

1. The user will be presented with the following enhanced gadgets
2. **myNetworks Gadget -** will have the same functionality as My Networks in memberNet with the addition of geography; The list order has been changed as per recommendations. This gadget will serve as the sub navigation gadget within the Community Desktop. Upon click, each network listed in myNetworks will provide a list of members associated with the given network.
3. **Section Gadget –**The Section gadget will be split into four tabs, mySection, Meetings, Who’s New, and Elevations.
   1. The mySection tab will list links to a Section website (New window), Section officers (Inline), Affinities (Inline), and Technical chapters (Inline).
   2. The “Meetings” tab will provide a list of meetings for a given section, each link should be launched inline.
   3. The “Who’s new?” tab will list users that have recently opted in information based on requirement FS02-04.
   4. The Elevations” tab will provide a links to memberNet profiles for members that have been recently elevated.
4. **Membership Gadget –**The membership gadget will provide a separate sub-gadget for each membership listed in myNetworks. Each sub-gadget will be split into five tabs, mySection, Meetings, Who’s New, and Elevations.
   1. The mySection tab will list links to a Section website (New window), Section officers (Inline), Affinities (Inline), and Technical chapters (Inline).
   2. The “Meetings” tab will provide a list of meetings for a given section, each link should be launched inline.
   3. The “Who’s new?” tab will list users that have recently opted in information based on requirement FS02-04.
   4. The Elevations” tab will provide a links to memberNet profiles for members that have been recently elevated.
5. **Expand myNetworks gadget** - Community Desktop will have a gadget called “Expand myNetworks”. It will mirror the current feature found in memberNet called “Expand myNetworks gadget.
6. **Meetings Tab** - The “Meetings” tab will display associated RSS feed of that section.
7. **Who’s new tab** - The “Who New?” tab will display, the members who recently changed their opt-in preferences within that section the Icon, lastname, firstname will be displayed. Upon clicking the link of the member the member profile of that user will be displayed.
8. **Elevations Tab** - The “elevations” tab will display the members who have been elevated the present year at the time off the selection. Upon selecting the user is presented a listing of members. The listing will have Icon, Lastname, Firstname and Grade. Each member name would be linked upon selecting would bring you to the member’s profile.
9. **Society Membership Component -** If the OU is a Society , the Gadgets tab include “Conference” , “Who’s New?” and “Elevations”.
10. Conferences Tab - The “Conferences” tab of the Society Membership gadgetd is selected will display the conferences of that Society. The gadget behaves in the same functionality as the “Upcoming conferences” with the present Community Desktop.

### Profile Quick Views

1. User selects a profile from within the Who’s online display
2. User is presented with a profile Quick view replacing the Who’s online display within the inline window.

### Landing Page

1. The first time users log in to myIEEE they will be presented with an inline dialog box. This box will contain text explaining the contents of this release as well as a link to an online video tutorial of myIEEE.

### myProfile

1. User with see their profile as others users see it when the myprofile is selected. Please note this is not a pop-up window.
2. When the users selects myProfile the search Bar will changed to membernet automatically.
3. User can select “edit myProfile” will allow the user to change their Opt-in preferences or any other account information
4. Upon changing the user will be prompted to save profile

### Search Who is online

1. User would selects Who’s online Search link
2. User is presented a Search with a filtered search that the user can type in real time

### Offline Toggle

1. If User selects the Offline toggle User is not listed is the Who’s online results

### Member get a Member

1, When a user selects the MGM link they will be presented the Member get a member form.

1. Upon submitting an automatic email will be received by the recipients email which will contain a link referencing the Recruiters’ credentials (non identifying) so that it can be passed when the Join ORL link within the email is selected.

### Volunteer Desktop for a non-volunteer

1. User selects the volunteer desktop and is presented with the following gadgets:
2. Volunteering Networks
3. IEEE.tv Programs on Volunteering
4. Voluteer Recruitment
5. Member Spoltlight – volunteer
6. Volunteer resources
   1. Member spotlight – volunteer - The spotlight is existing functionality with the volunteer desktop
   2. Volunteer Resources - The volunteer resources gadget has hyperlinks to the following resources:
      1. All Volunteers
      2. Writing Articles/Creating Content
      3. Publishing
      4. Technical Societies
      5. Sections
      6. Chapters
      7. Student Branches
      8. Conferences
      9. Standards Development
      10. Professional Development
      11. Organizational Unit Board Activities
   3. IEEE.tv programs on Volunteering – This will access the IEEE.tv API and will search for volunteer. The result set will randomize three programs on the gadget.
   4. Volunteer Recrutiment tool - The volunteer recrutiment tool will allow the end-user to submit a form inicating their interest ina postion, what OU their Orgainzation Management Skills, Their comments and volunteering skills.

# Open Issues

## Open Issues that require resolution to move this project forward.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Req ID# | Issue Description | Orig. Date | Status | Owner |
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# Document Version History

## Note original approved and subsequently updated version with reason for the revision. Most recent first.

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| 1 | Draft Version (V.01) | 11/01/2009 | Draft | Esther Posen |

# Appendix A – System Monitoring

**Application Monitoring**

**Contact: Joaquin Tejada x5410 or Hai Nguyen x3438**

**General Information:**

Project or Helpdesk Number: \_\_\_\_\_\_\_\_\_\_

Requestor: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Contact Number: \_\_\_\_\_\_\_\_\_

BA/CIM: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Contact Number: \_\_\_\_\_\_\_\_\_

Business Owner: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Contact Number: \_\_\_\_\_\_\_\_\_

**UAT URL:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Username: \_\_\_\_\_\_\_\_\_\_\_\_

Password: \_\_\_\_\_\_\_\_\_\_\_\_

**PROD URL:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Username: \_\_\_\_\_\_\_\_\_\_\_\_

Password: \_\_\_\_\_\_\_\_\_\_\_\_

**Is the application hosted by IEEE?**

If YES, please provide name and contact number of:

|  |  |  |  |
| --- | --- | --- | --- |
| System Admin: | \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ | Contact Number: | \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |
| Application Developer: | \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ | Contact Number: | \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |

**If NO, please provide the following:**

|  |  |  |  |
| --- | --- | --- | --- |
| Company Name: | \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ | Company Name: | \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |
| Contact Name: | \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ | Contact Name: | \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |
| Work Number: | \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ | Work Number: | \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |
| Cell Number: | \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ | Cell Number: | \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |
| Home Number: | \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ | Home Number: | \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |

**Please send a copy of SLA from/with the third party vendor to bpm-admin@ieee.org**

Note: This Form is 3 pages.

**System Monitoring Information:**

**How frequent do you want to monitor the application (ie. every 1,5,10,20,30 minutes)? \_\_\_\_\_\_\_\_\_\_\_\_\_**

When do you want to get notified in the event of a problem? (mark with X)

|  |  |  |
| --- | --- | --- |
| Right Away | \_\_\_\_\_\_\_\_ |  |
| After Two Occurrences | \_\_\_\_\_\_\_\_ |  |
| After Certain Number of Minutes | \_\_\_\_\_\_\_\_ |  |

* **Note: Notification depends on how often the application is being monitored.**

**We will be providing three measurements based on the following condition:**

* **Availability:**

A system is judged available when a monitoring transaction testing a system completes without detecting an error. Most errors indicate that a system is not available. Exceptions include those errors that indicate that a system is available, but not working correctly.

* **Accuracy:**

The accuracy rating for monitored systems is calculated only after systems are determined to be available. Accuracy rates reflect whether monitored systems work as designed and if information transmitted to clients is correct. Useful functions that can be evaluated to determine accuracy include link checking, content validation, title validation, and response data verification. If a monitoring script contains customized functions that are used to ascertain system accuracy, these functions will also be factored into the accuracy rate.

Accuracy ratings go far beyond simply checking for availability. A server may be available even when the application it hosts isn't responding. Likewise, dynamic pages may be corrupt, database queries may produce empty result sets, and warehouses may run short of stocked merchandise. The simple checking of availability will not alert one to such failures. Only complex transactions that compare results to benchmarks detect such problems.

* **Performance:**

Once a monitored system is judged to be accurate, the performance health dimension of the system is calculated. Performance rates are based on sets of timers and counters that are created via BDL transaction system-monitoring.

**Please provide notification list (email and /or pager):**

|  |  |
| --- | --- |
| 1. \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ | 5. \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |
| 2. \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ | 6. \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |
| 3. \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ | 7. \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |
| 4. \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ | 8. \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |

**Support Coverage:**

**Personnel:**

|  |  |  |  |
| --- | --- | --- | --- |
| **Primary Support Person** | | **Secondary Support Person** | |
| Contact Name: | \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ | Contact Name: | \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |
| Work Number: | \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ | Work Number: | \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |
| Cell Number: | \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ | Cell Number: | \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |
| Home Number: | \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ | Home Number: | \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |

**Coverage:**

|  |  |  |  |
| --- | --- | --- | --- |
| **Days** | **Hours** | **Night** | **Hours** |
| Monday | : \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ | Monday | : \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |
| Tuesday | : \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ | Tuesday | : \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |
| Wednesday | : \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ | Wednesday | : \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |
| Thursday | : \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ | Thursday | : \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |
| Friday | : \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ | Friday | : \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |
| Saturday | : \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ | Saturday | : \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |
| Sunday | : \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ | Sunday | : \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |

Do you want to be contacted by IEEE Data Center Operator when there’s a problem? (Yes or No)

* \_\_\_\_\_\_\_\_\_\_

**For Yes, the following rule applies:**

1. Application Support staff must agree to take ownership and make the necessary to additional support staff or third party vendor in order to resolve the problem.
2. Application Support Staff will communicate with IEEE Data Center Operator status of when the application will be available again by phone and/or by filling in the Service Desk Alert:

Sample Service Desk Alert

a. Application/Server Name:

b. Date/Time of Outage:

c. Help Desk Request Number:

d. Person Assigned:

e. Customers Impacted:

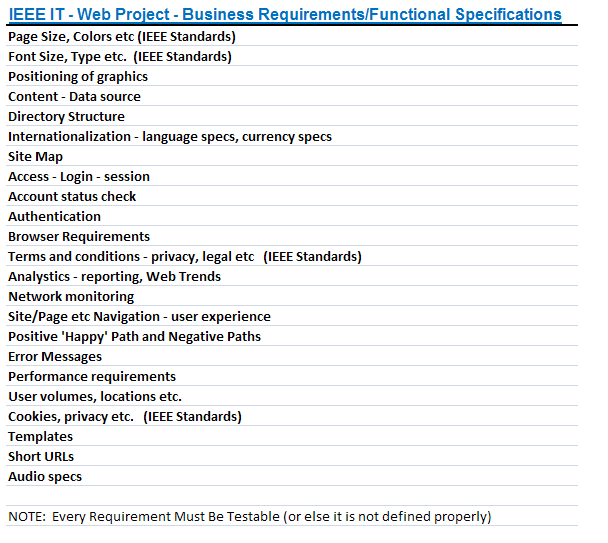
f. Status:

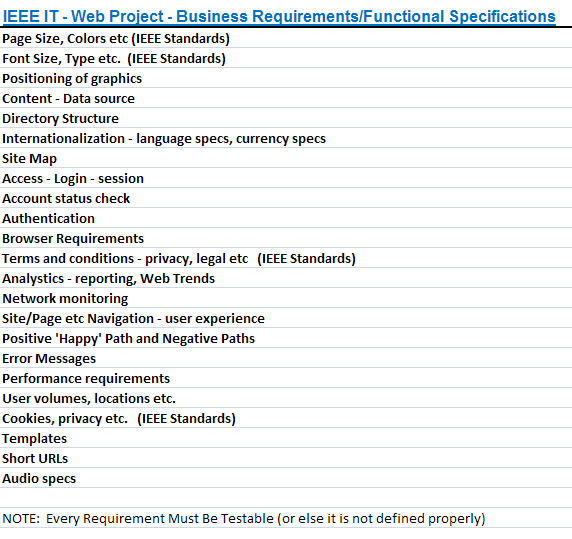
g. Estimated duration:

h. Next Notification:

# Web Project Checklist - Appendix B

1. Page Size, Colors etc – IEEE Standards
2. Font Size, Font Type etc – IEEE Standards
3. Positioning of Graphics
4. Graphics Resolutions/Size
5. Content – Data Source
6. Directory Structure
7. Site Map
8. Site/Page Navigation Specs – User Experience (Happy Path & Negative Path)
9. Work-flow information
10. Authentication
11. Security Rules
12. Access-Login – session rules
13. Account Status Check
14. Browser Requirements
15. Terms & Conditions – privacy, legal etc (IEEE Standards)
16. System Monitoring / Analytics / Web Trends etc.
17. Network Monitoring
18. Hand-held usage requirements
19. Internationalization requirements (languages, currencies etc)
20. Error Message requirements
21. Performance requirements
22. User Profile, Volume, locations
23. Cookies
24. Templates
25. Short URLs
26. Audio Specs
27. Streaming Specs





# Appendix C: Gadget Types and C-Level

**Gadget “Types”** - define what configurable values will be provided to roles that have been granted customize privileges. Volunteer Subpages will have three gadget “C-levels” and three “Types”:

1. **Static Link Gadget** – A gadget that contains a set of static links.
   * It can be customized on the gadget after it has been added.
   * For more info on the static link gadget see Req. FS03-02
2. **Dynamic Gadget** – A gadget that retrieves its contents dynamically via a pre-defined set of criteria/logic.
   * The location of this gadget on a given page can be customized by designated roles.
   * Dynamic gadgets do not have the “gear” icon since the features within are coded via pre-defined criteria\logic.
3. **RSS Gadget** – A gadget that retrieves and displays an RSS feed in it, Title and an optional descriptive area.
   * For more info on the RSS gadget see Req. FS03-03

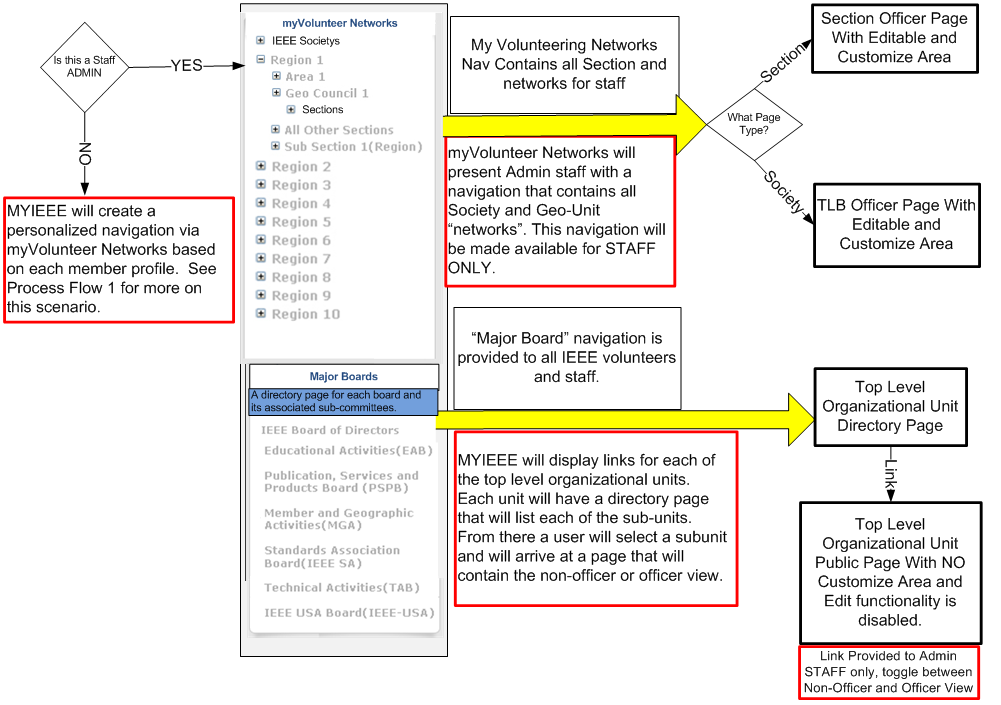
**Gadget “C-Level”** - defines the level at which a gadget can be customized. (Please note: C-level derived = customize level.) C-level is a specified attribute for gadgets found via the Volunteer area in “browse Gadgets. This attribute is applicable for gadgets that are being created “out of the box” for the volunteer desktop. If an admin makes a change to a gadget found in this repository these changes will not be subject to the “User Generated Gadgets” workflow features specified in Requirement FS 03-07.

1. **Global** – A gadget that is the same no matter where it is found in myIEEE. Customizations or changes made to global gadgets will update the gadget found in the gadget repository and all pages where this gadget resides. Gadgets of this C-Level can be customized on any page and changes will be seen across all pages where the gadget resides. Global C-level Gadgets will only be editable by designated Admins.
2. **Subpage** – A gadget that is the same across a subpage type but can contain different content when displayed on a different subpage type. IE. – Meetings for Geo Units vs Meetings for Top Level OU’s. When a change is made to a subpage C-level it will be visible only on gadgets that reside on the same subpage type. Subpage C-level Gadgets will only be editable by designated Admins.
3. **Page Specific** – A gadget that could contain a unique configuration for on each page it is on. IE. Governance Docs. If a customization is made to this C-Level, the change will only be visible on the specific page where the customization was made. Page Specific C-level Gadgets could be editable by designated Admins, Staff and/or Volunteers.

All gadgets in myIEEE should be setup to “Fail Gracefully”, that is if the content is not retrievable the gadget should display the standard myIEEE content unavailable message. For more information on the role based workflow implied by this requirement see process flows(Admin and Users) below

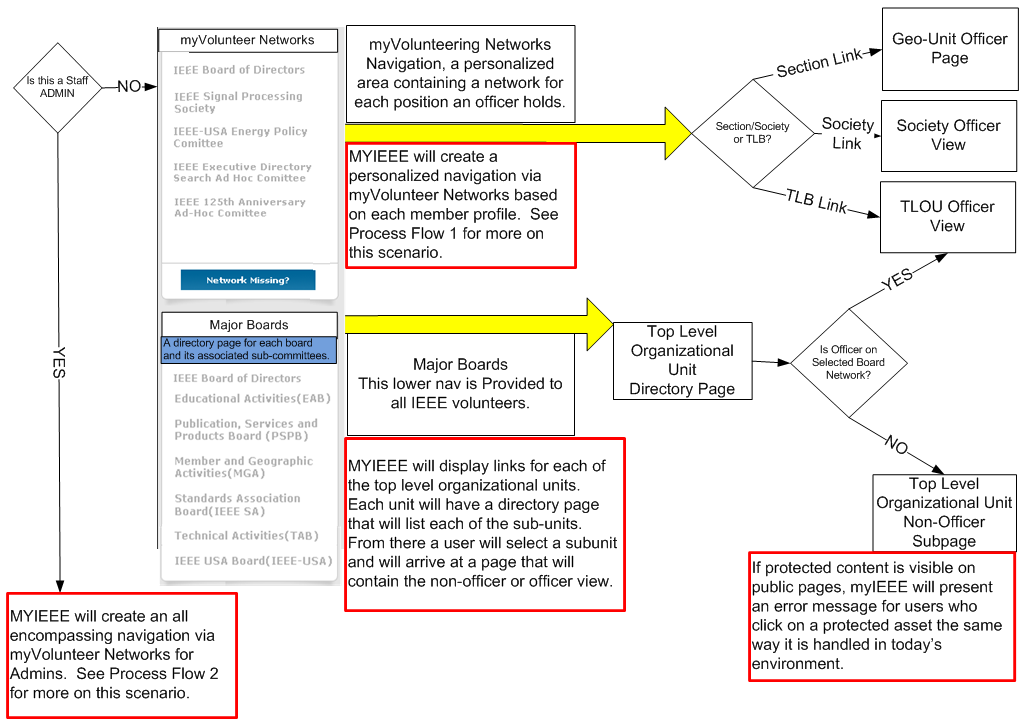
## 

## Navigation Process Flow Diagram (Users)



## 

## Navigation Process Flow Diagram (Admins)

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